

NEWMIND RESEARCH · BENCHMARK REPORT 05

SAAS SPEND & LICENCE UTILISATION BENCHMARK 2026

What companies spend on software subscriptions, how much of it goes unused, and the playbooks and tools to take it back.

Edition 1

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About this edition

This is Edition 1 of the NEWMIND SaaS Spend & Licence Utilisation Benchmark. It is a desk-research edition: it contains no survey data. It is built on public company filings, official price, wage and regulatory data, published list prices and vendors' own published figures, each fetched, saved and checked for this edition.

What this edition contains

- **Spend and utilisation:** what the published vendor indexes report on SaaS spend, portfolio size and unused licences, and how far each figure can be trusted.
- **Seller side:** list prices for common plans^{1,2}, what public software companies' annual reports show³, and software producer prices against consumer prices^{4,5}.
- **A shelfware model:** the yearly cost of unused seats at list prices, labelled 'Market research model · based on published benchmarks'.
- **8 trend chapters:** who buys SaaS now, shadow IT and expensed software, AI spend (the fastest-moving line), consumption pricing and unexpected charges, credit pools (modelling a seat-plus-usage bill), where spend control meets security, FinOps practice and what it teaches SaaS, negotiation services and their claims.
- **Playbooks:** build the SaaS inventory, the renewal calendar, reclaim unused licences, prepare a renewal negotiation, rationalise overlapping tools, AI tool guardrails, joiners, movers and leavers, contract terms to ask for, operating model and governance.
- **Tools, regulation and roadmap:** the SaaS-management tool landscape, the US Negative Option Rule, the EU Data Act's switching rules, a 90-day and 12-month plan and the business case.
- **Self-assessment toolkit:** a KPI sheet, a scoring worksheet, scenario tables, a comparison sheet against published figures, grids for unused spend and renewal effort, a labour-cost reference for 9 roles from May 2025 wage data⁶, and blank worksheets for the inventory, reclaim log, renewal calendar, vendor questions, business case, AI tools, ownership, a twelve-month KPI tracker, an action plan, a renewal negotiation brief and a new software request form.

What it does not contain yet

No original survey data. Edition 1 is desk research. Edition 2 is planned to add a survey of finance, IT and procurement teams, with utilisation, renewal and uplift figures that companies do not publish.

Who it is for

CFO and finance leaders; CIO, CTO and IT leaders; procurement. Companies paying for dozens of SaaS applications or more.

You will recognise these signals

- Renewals arrive as invoices, after the notice date has passed
- Nobody can say how many applications the company pays for
- Software shows up on cards and expense claims, outside procurement

What to measure

- Applications in use and who owns each one
- SaaS spend per employee, by department
- Licence utilisation: seats used against seats paid
- Renewals reviewed before the notice date
- Usage-priced and AI spend against budget

How to read the numbers

- **Market figures** carry a numbered source. Where sources disagree, each is shown and named, never averaged.
- **Vendor figures** are tagged 'vendor claim', or named as a vendor index (Zylo customer data) where they describe a vendor's own customers. They are not independently verified and are never used as model inputs.
- **Models** are transparent: every formula and input is printed so you can replace it with your own data.
- **Currency:** US dollars throughout.

From benchmark to your numbers

A NEWMIND feasibility audit measures your own software estate in 2–4 weeks and delivers:

- Your SaaS inventory and spend vs the published figures
- Unused seats and their yearly cost
- A renewal calendar with notice dates and owners
- Build-or-buy comparison of SaaS-management options with costs

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Executive summary

SaaS is now bought by business units as much as by IT, priced by seat and increasingly by usage, and renewed automatically unless someone acts before the notice date. The published figures all point the same way: a large share of what is paid for is not used, and the lever is a monthly discipline, not a new tool.

\$9,455

Median SaaS spend per employee, vendor index (Zylo customer data) ⁷

36%

Average share of SaaS licences left unused against industry-recommended levels, same index ⁷

81%

Share of SaaS spend controlled by business units, same index ⁷

Ten findings

01 Business units, not IT, now hold most SaaS spend

Business units control 81% of SaaS spend and IT directly manages 15%, in Zylo's 2026 index, built on its customers' data ⁷. Spend control has to follow the budget holders, not the IT department.

02 A median of \$9,455 per employee, from one vendor's customers

Zylo reports a median SaaS spend of \$9,455 per employee, from more than 40 million licences under its management ⁷. It is a vendor index (Zylo customer data), not a market census: use it as a reference point, not a target.

03 More than a third of licences go unused

The same index reports that, measured against industry-recommended utilization levels, organisations leave an average of 36% of their SaaS licences unused ⁷. Each dollar of seats paid for and not used buys nothing, and the bill does not change until a renewal or true-down allows it.

04 AI-native spend more than doubled in a year

AI-native application spend jumped 108%, and 393% at large enterprises, in one year, in the same vendor index (Zylo customer data) ⁸. It is the fastest-moving line in the bill and the one with the fewest controls.

05 Usage pricing brings bills nobody planned

In a vendor survey of 218 IT leaders, 78% reported unexpected charges tied to consumption-based or AI pricing models **VENDOR CLAIM** ⁷. A seat price is fixed; a credit or token price needs a budget, a limit and an owner.

06 Software is bought on cards, outside procurement

Expense-based SaaS spend increased 267% year over year, in the same vendor index (Zylo customer data) ⁷. Card and expense claims belong in the inventory from day one.

07 Software producer prices rose more slowly than consumer prices

From August 2017 to August 2026, the US producer price index for software publishers rose more slowly than consumer prices, by 11.7% against 36.4% in BLS data ^{4,5}. Vendor uplifts at renewal are a negotiating position, not an index.

08 Unused seats are the cheapest saving

A team of 250 on Salesforce Pro Suite with 20% of seats unused pays \$60,000 a year for nothing at list price ¹ (NEWMIND model). Removing them at renewal needs no new tool.

09 Regulation is moving on renewals and switching

In the US, a Federal Register rule ⁹ records that the Eighth Circuit vacated the FTC's 2024 amendments to the Negative Option Rule; the earlier text, recodified, has applied since 12 February 2026. In the EU, the Data Act ¹⁰ removes switching charges, including data egress, from 12 January 2027.

10 No independent utilisation benchmark was found

The utilisation figures published today come from SaaS-management vendors' own customers. MarketsandMarkets ¹¹ puts the market for those tools at \$4.58 billion in 2025, growing to \$9.37 billion by 2030. This report gives definitions and a measurement method so you can measure your own rate.

What to do on Monday

1. Fill in the KPI sheet with what you can measure today (full report, chapter 36).
2. Build one inventory from single sign-on, expense and accounts payable (full report, chapter 21).
3. Put every renewal and notice date in one calendar with an owner (full report, chapter 22).
4. Run the first monthly reclaim of unused seats (full report, chapter 23).
5. Price your shelfware with the reference grids (full report, chapter 11).

Market context: SaaS vendors and the tools that manage them

Software bought as a subscription is now a standing line in every budget. This chapter sets out how large the market for managing that software is, and how fast the companies that sell it are growing. The growth of the sellers is the pressure every buyer faces at renewal.

\$4.58B

SaaS management market, 2025, MarketsandMarkets ¹¹

\$9.37B

Forecast for 2030, same source ¹¹

13.7%

Median revenue change across 19 listed SaaS vendors, latest fiscal year (NEWMIND calculation from 10-K filings)

The market for managing SaaS

MarketsandMarkets sizes the market for SaaS management software, the tools that track licences, usage and renewals, at \$4.58 billion in 2025, with a forecast of \$9.37 billion by 2030 and a compound annual growth rate of 15.4%, according to its public summary ¹¹. NEWMIND checked the rate against the two end points: it is consistent. The full report is paid and was not read.

YEAR	MARKET SIZE	BASIS
2024	\$3.87 billion	Reported market size
2025	\$4.58 billion	Projected
2030	\$9.37 billion	Forecast

The same summary names the security and governance segment as the fastest growing, at a rate of 18.3% a year ¹¹. This is a market for the tools that manage SaaS, not the market for SaaS itself, which is many times larger.

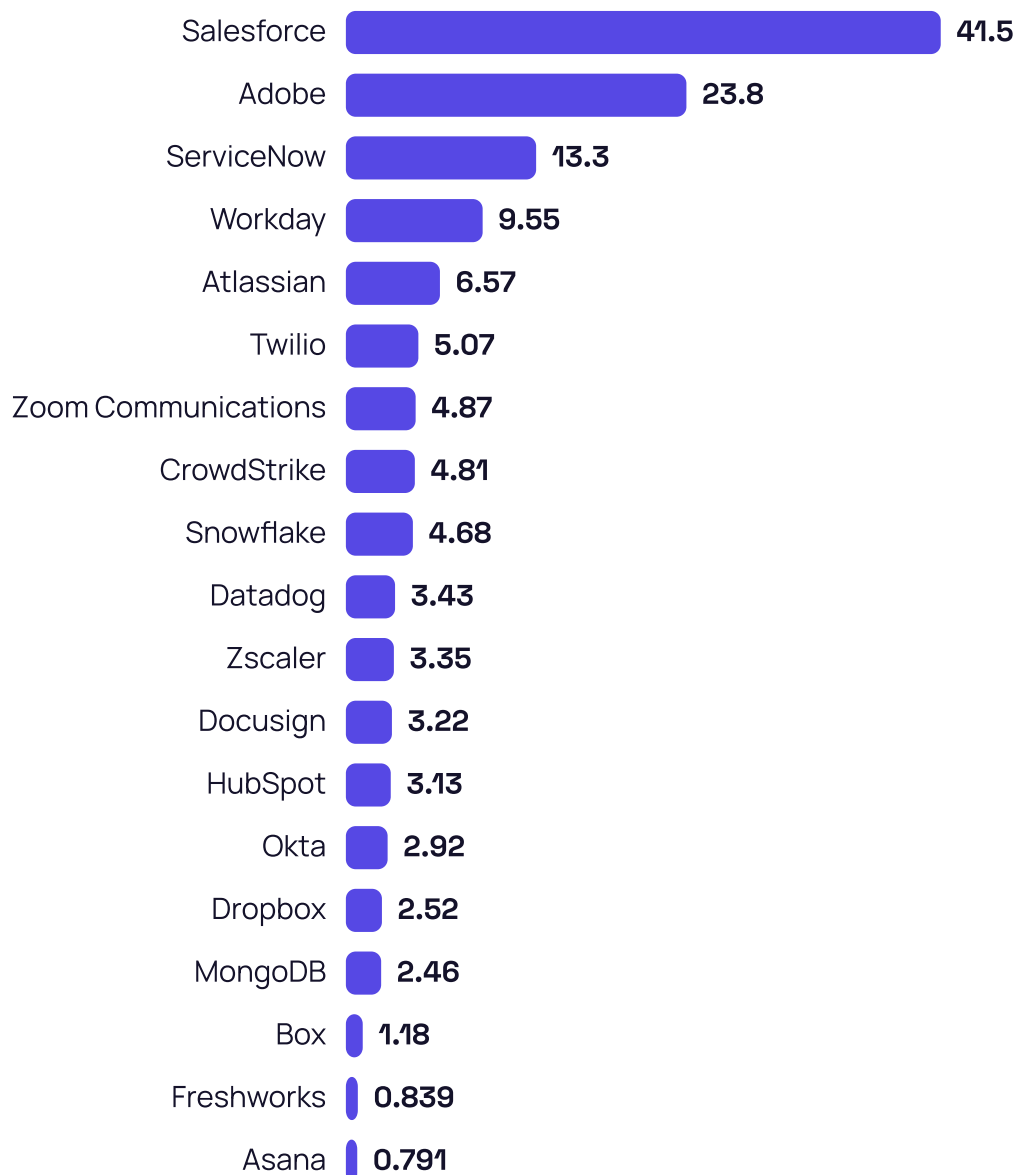
The sellers: 19 listed SaaS vendors

To see the supply side without relying on vendor marketing, NEWMIND read the annual reports (Form 10-K) that 19 listed software-as-a-service vendors file with the U.S. Securities and Exchange Commission. Together they reported \$138 billion of revenue in their latest fiscal year. Revenue was higher than the year before at 18 of the 19 and lower at Dropbox; the median change was 13.7%.

COMPANY	CATEGORY	FISCAL YEAR TO	REVENUE (\$ MILLION)	PRIOR YEAR (\$ MILLION)	CHANGE
Salesforce	CRM and sales	January 2026	41,525	37,895	rose 9.6% ³
Adobe	Creative and document	November 2025	23,769	21,505	rose 10.5% ¹²
ServiceNow	IT and service workflow	December 2025	13,278	10,984	rose 20.9% ¹³

COMPANY	CATEGORY	FISCAL YEAR TO	REVENUE (\$ MILLION)	PRIOR YEAR (\$ MILLION)	CHANGE
Workday	HR and finance	January 2026	9,552	8,446	rose 13.1% ¹⁴
Atlassian	Developer and team collaboration	June 2026	6,572	5,215	rose 26.0% ¹⁵
Twilio	Communications APIs (usage)	December 2025	5,067	4,458	rose 13.7% ¹⁶
Zoom Communications	Meetings and communication	January 2026	4,869	4,665	rose 4.4% ¹⁷
CrowdStrike	Endpoint security	January 2026	4,812	3,954	rose 21.7% ¹⁸
Snowflake	Data platform (consumption)	January 2026	4,684	3,626	rose 29.2% ¹⁹
Datadog	Observability	December 2025	3,427	2,684	rose 27.7% ²⁰
Zscaler	Network security	July 2026	3,353	2,673	rose 25.4% ²¹
Docusign	Agreements and e-signature	January 2026	3,220	2,977	rose 8.2% ²²
HubSpot	CRM and marketing	December 2025	3,131	2,628	rose 19.2% ²³
Okta	Identity and access	January 2026	2,919	2,610	rose 11.8% ²⁴
Dropbox	File sharing	December 2025	2,521	2,548	fell 1.1% ²⁵
MongoDB	Database platform (usage)	January 2026	2,464	2,006	rose 22.8% ²⁶
Box	Content and file sharing	January 2026	1,177	1,090	rose 8.0% ²⁷
Freshworks	Service and CRM	December 2025	839	720	rose 16.4% ²⁸
Asana	Work management	January 2026	791	724	rose 9.2% ²⁹

Latest fiscal-year revenue, USD billion (company totals)



Company totals include all products, geographies and services, not only subscriptions. Fiscal years end in different months, so the rows are not a single calendar year. Categories are NEWMIND labels.

What the sellers report about their own customers

High Alpha publishes an annual benchmark survey of SaaS companies with 800+ respondents³⁰. It finds that retaining 9 out of 10 customers is the norm in every revenue band³⁰, and that companies above \$50 million of annual recurring revenue now get roughly 60% of new revenue from existing customers³⁰.

What this means for a buyer

Most of a large vendor's growth now comes from customers it already has: more seats, higher tiers, new add-ons and price changes at renewal. The renewal is where that growth is booked, so the renewal is where a buyer has to arrive prepared (NEWMIND analysis).

High Alpha surveys SaaS vendors, not buyers; its figures describe the supply side. It is an industry survey, not an official statistic.

Definitions: what counts as SaaS spend

Spend figures are only comparable when the words mean the same thing. These are the definitions used in every NEWMIND model and worksheet in this report. Third-party figures are quoted with the publisher's own wording.

TERM	MEANING IN THIS REPORT
SaaS spend	Everything paid for software delivered over the internet on a subscription or usage basis: contracts, card payments and expensed purchases.
Provisioned licence (seat)	A named user or unit the company pays for, whether or not anyone uses it.
Active licence	A provisioned licence with real use inside a stated window, usually the last 30 or 90 days.
Utilisation	Active licences ÷ provisioned licences, per application and per tier.
Shelfware	Paid licences with no use in the window; the opposite of utilisation.
Tier mismatch	A user on a higher, more expensive tier than their actual use needs.
Consumption pricing	A bill driven by usage (calls, credits, compute, storage) rather than seats.
AI credit pool	A shared allowance of usage units that each licence adds to; use beyond the pool is billed.
Shadow IT	Software bought or used without IT or procurement involvement.
Expensed SaaS	Software paid on a card or by expense claim, outside a negotiated contract.
Renewal notice window	The days before renewal by which a change or cancellation must be given in writing.
Auto-renewal	A clause that renews the contract for a new term unless notice is given in time.
Annual contract value (ACV)	What one year of a contract costs at the current price and quantity.
Uplift	The price rise applied at renewal, often written as a percentage cap.
Remaining performance obligations (RPO)	In a vendor's accounts: contracted revenue not yet recognised, a measure of committed future billing.

Three counts that are easy to confuse

- **Applications** counts distinct products in use. It says nothing about cost.
- **Licences** counts what is paid for. It is the base for utilisation.
- **Active users** counts people who use the tool. It is the numerator of utilisation.

The measurement window

Utilisation depends on the window. A licence used once in 90 days counts as active on a 90-day window and as shelfware on a 30-day window. NEWMIND uses 90 days for named seats and a full billing cycle for consumption contracts. State the window next to every utilisation figure you report.

Definitions are NEWMIND practice

The definitions above are NEWMIND practice guidance. Vendors and analysts may define the same words differently; where a figure from another publisher is quoted, read it with that publisher's definition.

How much companies spend on SaaS

How much a company spends on SaaS depends first on its size. The only large, recurring public series on SaaS spend comes from SaaS-management vendors, built on the data of their own customers. This chapter sets out what they report, and how far each figure can be trusted.

\$55.7M

Average annual SaaS spend, Zylo 2026 index ⁸

\$20.6M

Median annual SaaS spend, same index ⁸

\$9,455

Median SaaS spend per employee, same index ⁷

What the largest vendor index reports

Zylo's 2026 SaaS Management Index covers more than 40 million licences and \$75 billion of spend under its management ⁷. It reports ⁸ an average of \$55.7 million of SaaS spend a year, an 8% increase on the year, and a median of \$20.6 million. The gap between the average and the median shows how far a few very large estates pull the average up.

In large enterprises, the index reports that annual SaaS spend increased by about 16% on the year ⁸. The same index ⁷ reports a median spend per employee of \$9,455.

Spend by company size

The 2025 edition gives the two ends of the size range ³¹:

COMPANY SIZE (AS PUBLISHED)	AVERAGE SAAS SPEND	APPLICATIONS
1 to 500 employees	\$11.5 million	152
10,000+ employees	\$284 million	660

Flexera's 2026 State of the Cloud survey ³² asked about monthly SaaS spend. Among smaller firms, those with fewer than 1,000 employees, 73% spend less than \$50,000 a month; 72% of enterprises fall in the \$200,001 to \$500,000 monthly bracket; and 84% of large enterprises, more than 10,000 employees, spend more than \$5 million a month.

These size-band shares do not reconcile with the same survey's figure for all respondents. Enterprises are 51% of respondents ³², so 72% of them would put about 37% of all respondents in the \$200,001 to \$500,000 bracket, yet Flexera reports ³² that bracket as the largest group, at 18% (NEWMIND check). Flexera does not explain the gap; both are printed as published and neither is used in a model.

Two figures that must not be read as a trend

The 2025 index reported an **average** of \$4,830 per employee ³¹. The 2026 release reports a **median** of \$9,455 ⁷. An average and a median of different customer bases cannot be compared, so this report does not compute a change between them.

How far to trust these figures

- They are a vendor index (Zylo customer data): companies that already pay for a SaaS-management tool. That group is likely to be larger and more active in managing software than the market as a whole.
- The sample changes from year to year as customers join and leave.
- The method is not published in full; the figures here come from press releases and a landing page.
- They are printed as context only and are never inputs to a NEWMIND model.

Flexera figures come from a survey of technology professionals and leaders; see the FinOps chapter (full report, chapter 18) for its sample.

Sources

Each entry gives the date that applies to it: when a law was adopted or came into force, when a document was published, or, for live web pages and datasets, when it was accessed (7 October 2026). Figures quoted are short, attributed and linked; no paywalled tables and no third-party charts are reproduced.

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Get the full report

This sample includes the cover, contents, about page, executive summary, the market context, the definitions, the SaaS spend benchmark and the sources cited in them. The full report continues with portfolio size, licence utilisation, list prices, seller pressure, software prices against inflation, the shelfware model, eight trend chapters, nine playbooks, the tool landscape, US and EU regulation, a 90-day and 12-month roadmap, the business case and the self-assessment toolkit.

Full report

newmindpartners.com/benchmark-saas-spend.html#report

NEXT STEP

TURN THIS BENCHMARK INTO YOUR OWN SPEND-CONTROL WORKFLOW.

You now know what SaaS costs, how much of it goes unused and where the bills come from. NEWMIND PARTNERS designs, builds and runs the workflow that closes your gap: inventory, seat reclaim, renewal calendar and usage-priced spend limits, built around the systems you already use.

01

Feasibility audit

In 2–4 weeks we measure your software estate on your data (read-only): applications, owners, seats paid and used, renewal and notice dates, and card and expense spend. Then we compare every option on the market, off-the-shelf or custom.

02

Design

We design the inventory, reclaim and renewal workflow around your single sign-on, HR, expense and accounts-payable systems, with a human checkpoint on every decision that matters.

03

Build and run

Our senior engineers build it, connect it to the systems you already use, and run it in production with an audit trail.

04

Prove it

Baseline on day one, then the change in unused seats, renewals reviewed in time and spend, reported every month.

Start with a feasibility audit

Find out what your software estate really costs, which option fits best, and the business case to back it. No commitment.

[Start a feasibility audit →](#)